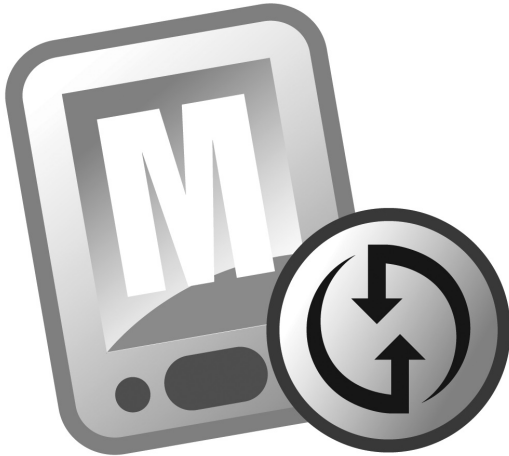


# MaxMobile 9

for Windows Mobile™ OS v9.5



# Welcome to MaxMobile



## Introduction

MaxMobile provides you a way to take your customer information on the road. You can take notes and synchronize them back to the corporate database, as well as check your schedule and make follow-up tasks for yourself to call back on important clients.

## System Requirements

### Installing MaxMobile

Before installing MaxMobile 9 for Windows Mobile™ OS, the following software must be installed on the computer:

- Maximizer 9/Maximizer Enterprise 9.5 or greater
- Microsoft ActiveSync

The MaxMobile installation also installs Microsoft SQL Mobile 2005 and Microsoft .NET Compact Framework 2.0 on the device if they are not already installed. These programs are required for MaxMobile.

#### ➤ To install MaxMobile

1. Close any Maximizer applications running on the computer.
2. Connect your Windows Mobile device to the computer.
3. Insert the MaxMobile installation CD into the computer's CD drive.

The installation program starts automatically. If it doesn't start, browse to your CD drive and double-click Autorun.exe.

4. Click **Install MaxMobile**.
5. Follow the installation wizard on-screen instructions.

Do not disconnect the Windows Mobile device at any time during the installation.

The installation installs MaxMobile components on the computer, and then it installs MaxMobile on the device.



6. During the installation, you may be prompted to choose whether to install on the device or the storage card. This option determines where the MaxMobile database file will be installed. (The MaxMobile application always installs to the device, regardless of which option you choose.) Select the location where you would like to install the database.

The installation may require you to restart the device.

7. Tap **Ok** to finish the installation on the device and restart if necessary.
8. Click **Finish** to close the installation wizard on the computer.

The installation is now complete. You must configure your MaxMobile synchronization settings in Maximizer before you can synchronize with MaxMobile.

## Starting MaxMobile

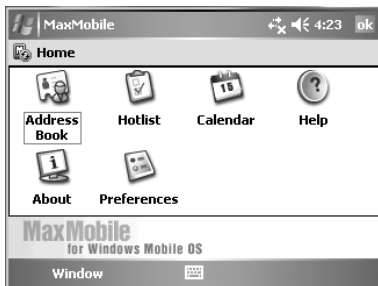
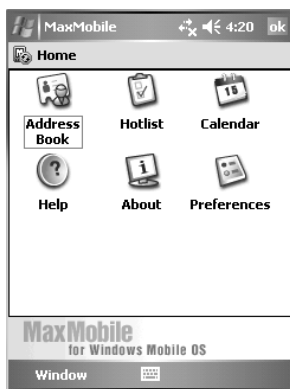
➤ To start MaxMobile on your Windows Mobile device



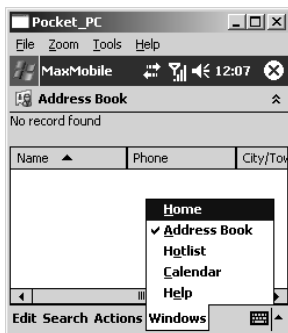
1. Tap **Start** > **Programs**.
2. Tap **MaxMobile**.

## Using MaxMobile

You can use MaxMobile in either portrait (vertical) or landscape (horizontal) display mode, according to the settings on your Windows Mobile device.



Tap an icon in the main window to open the Address Book, Hotlist, Calendar, Help, About, or Preferences windows. When you have the Address Book, Hotlist, or Calendar window open, you can jump directly to another MaxMobile window by tapping the Window menu.



## Setting MaxMobile Preferences

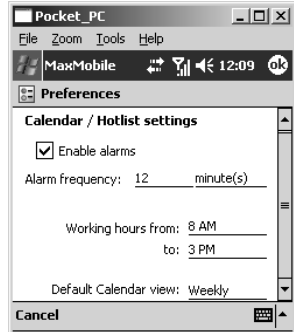


Tap the Preferences icon to open the Preferences window.

**Enable alarms** turns the Hotlist task and appointment alarm functionality on or off. You can also specify how frequently MaxMobile should check for alarms.

**Set working hours** determines the display hours of the Daily and Weekly views in the Calendar.

**Default Calendar view** determines which calendar view opens automatically when you open the Calendar window.



## Using the Menus

For each of the MaxMobile windows, a set of menus is available from the menu bar and additional context-sensitive menus appear when you tap and hold on an entry or inside a window.

### > To use the menu bar

1. Tap on a **menu** on the menu bar.
2. Tap on one of the **menu items**.

### > To use the context-sensitive menus

1. Tap and hold inside a **window**.  
– or –

Tap and hold on an **entry**.

The menu related to the current window or type of entry appears.

## Synchronization



Before you can synchronize, Maximizer and MaxMobile must both be installed on the same machine. Your Windows Mobile device must also be configured to synchronize with your computer.

Synchronization settings are configured on a per-user basis. To be able to synchronize Address Book entries, user-defined fields, and notes, you must have the “Allow Sync Contacts with External Clients” access right. However, you can still synchronize appointments and Hotlist tasks without this access right.

### Address Book Entry Synchronization

To synchronize Address Book entries, create a Favorite List of those Address Book entries and specify the Favorite List in your MaxMobile synchronization settings. In most cases, only the Maximizer Address Book entries you have added to the Favorite List identified for synchronization will synchronize from Maximizer to MaxMobile. However, if a Contact belongs to the Favorite List, but the Contact’s associated Company or Individual Address Book entry does not belong to the Favorite List, the Company or Individual will also synchronize. All Address Book entries in MaxMobile automatically synchronize to Maximizer, and they are added to the Favorite List.

#### ➤ To mark Address Book entries for synchronization

1. In Maximizer, create a Favorite List of the Address Book entries to synchronize with MaxMobile. For example, create a Favorite List called “MaxMobile Sync”. For instructions on creating a Favorite List, refer to your Maximizer documentation.
2. In Maximizer, select the Favorite List from the **Synchronize Address Book entries from Favorite List** drop-down list in Windows Mobile Settings (available in File > Preferences). For instructions on configuring Windows Mobile Settings, refer to page 8.

The Address Book entries are ready for synchronization.

## Changing the Synchronized Favorite List



If you change the synchronized Favorite List to one with a different name, the previously synchronized Address Book entries will no longer be synchronized unless they also belong to the new Favorite List.

### ➤ To change which Address Book entry Favorite List synchronizes with MaxMobile

1. Add any Address Book entries to synchronize to the new Favorite List.
2. In Maximizer, select **File > Preferences**, and click the **Windows Mobile Settings** tab.
3. Select the new Favorite List from the **Synchronize Address Book entries from favorite list** drop-down list.
4. Click **OK** to save your Windows Mobile Settings changes.

## Using the Reset MaxMobile Option

Note that you cannot synchronize more than one database with MaxMobile at a time. If you want to synchronize with a different database, you must first do a reset from Maximizer by choosing **Tools > Reset MaxMobile**. The Reset MaxMobile option does a complete refresh of the data on the device with the data in Maximizer. This option is also useful to clean up your data on the device.

## User-Defined Field Synchronization

When you configure MaxMobile synchronization settings in Maximizer, you can specify which Address Book entry user-defined fields to synchronize. You can select up to eight Address Book entry user-defined fields. MaxMobile cannot synchronize user-defined fields that have the "Encrypted", "Include in Hotlist", or "Annually recurring event" attributes.

## Note Synchronization



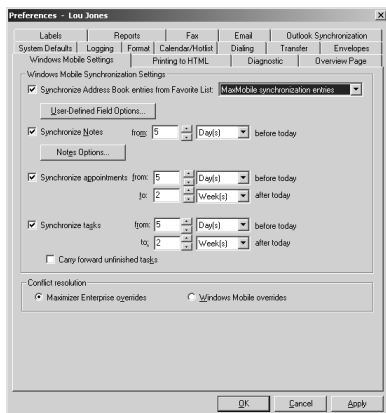
When you configure MaxMobile synchronization settings in Maximizer, you can specify what types of notes to synchronize by clicking the Notes Options button. When selecting which note types to synchronize, consider which types are likely to contain information you will need with you. For example, Manual notes are likely to contain information you will need, whereas History notes may not. Only notes of the selected types will synchronize, and only for synchronized Address Book entries.

## Appointment and Task Synchronization

MaxMobile can synchronize select calendar appointments and Hotlist tasks. When you configure MaxMobile synchronization settings in Maximizer, you can specify date ranges for appointments and tasks, and any appointments or tasks scheduled within those date ranges will synchronize between Maximizer and MaxMobile. If you select the “Carry forward unfinished tasks” option, it will also synchronize tasks that are scheduled before the date range but are incomplete. All new appointments and tasks created in MaxMobile synchronize to Maximizer, even if they fall outside the date range.

## Configuring MaxMobile Synchronization Settings

Configure MaxMobile synchronization settings in Maximizer or Administrator. These settings control which Address Book entries, user-defined fields, notes, appointments, and Hotlist tasks are synchronized between a Maximizer Address Book on your PC and MaxMobile on your Windows Mobile device.



> **To configure MaxMobile synchronization settings**



1. In Maximizer, select **File > Preferences** from the menu, and click the **Windows Mobile Settings** tab.

– or –

In Administrator, select **File > Users**, select the user, click the **Preferences** button, and then click the **Windows Mobile Settings** tab.

For more information about each of the settings, click inside the tab and press **F1**.

2. Specify your **Windows Mobile Synchronization Settings** for Address Book entries, user-defined fields, notes, appointments, and tasks.
3. Specify your **Conflict resolution** settings, which determine whether Maximizer fields overwrite MaxMobile fields, or MaxMobile fields overwrite Maximizer fields, when changes have been made to the same field in both Maximizer and MaxMobile.
4. Click **OK**.

Now you can synchronize with MaxMobile.

## Synchronizing MaxMobile with Maximizer

Your first MaxMobile synchronization may take more time than subsequent synchronizations. On the first synchronization, all the specified records must be created on your Windows Mobile device. On subsequent synchronizations, only new or changed records will be synchronized.

### ➤ **To synchronize MaxMobile with Maximizer**

1. Configure your MaxMobile synchronization settings.
2. Connect the Windows Mobile device to the computer.
3. In Maximizer, select **Tools > Synchronize with MaxMobile** from the menu.

A progress indicator appears and a dialog box opens with a display of the synchronization summary once the session is complete. System Table entries are Maximizer system fields – such as Category for an Address Book entry – and all user-defined fields specified for synchronization combined. Entries that appear in the Failed column are entries that failed to synchronize due to synchronization problems such as a lost connection. Address Book entries are never deleted from Maximizer if they are deleted on the device – these entries are removed from the Favorite List.

Note that if appointments and/or tasks are synchronized, but the associated Company, Individual, or Contact entry is not in the synchronized Favorite List, the entry is added to the Favorite List and synchronized to the device.

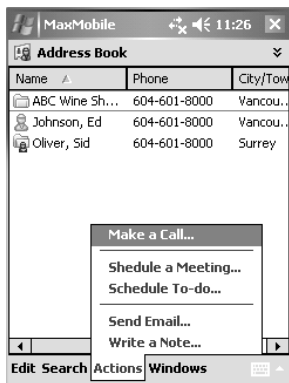
You should not synchronize with any records open or make changes during a synchronization. Doing so could cause problems with your data.

## Address Book Entries

Your MaxMobile database includes any Address Book entries synchronized from Maximizer, as well as any entries added in MaxMobile. When you add an Address Book entry in MaxMobile, it gets added to the synchronized Favorite List in Maximizer when you synchronize.



You can search for, view, add, edit, and delete Address Book entries using the Address Book window. You can also schedule an appointment or Hotlist task, write a note, or email or phone the entry directly from the Address Book list or from the open Address Book entry.



## Viewing a List of Address Book Entries

When you open the Address Book window, no Address Book entries appear in the list. You must first perform a search to populate the Address Book list. If you click the arrows on the right side of the Address Book window title bar, it displays the total number of Address Book entries in the list, as well as the number of company, individual, and contact entries.

The icons beside each Address Book entry identify whether it is a company, individual, or contact, and whether it is a lead.



Company



Individual



Contact



Company - Lead



Individual - Lead



Contact - Lead

The Address Book list includes columns for the company name (for companies) or full name (for individuals and contacts), primary phone number, and city or town. You can sort by any column, either ascending or descending, by tapping the column title, and you can resize any column by dragging the divider.

## Viewing Address Book Entry Details



Open the Address Book entry to view more information about the entry, including contact information and other details, related contacts, scheduled appointments and tasks, and notes.

### > To open an Address Book entry

1. Open the Address Book window.
2. Search or sort to locate the Address Book entry.
3. Tap the Address Book entry.
  - or –

Select the entry and tap **Edit > Open**.

## Searching for Address Book Entries

You can search for Address Book entries based on the value of a specific field. You can also retrieve a list of all Address Book entries in MaxMobile.

When you search for Address Book entries in MaxMobile, the search returns a list of all Address Book entries that match the search criteria and replaces the current list of Address Book entries in the window.

### > To display all entries

- In the Address Book window, tap **Search > Retrieve All**.

### > To search for specific entries

1. In the Address Book window, tap **Search**.
2. Select the type of field to search by from the menu.
3. Enter your search criteria in the Search By window, and tap **ok**.



## Adding Address Book Entries



When you add an Address Book entry, it presents you with a blank form, unless you are adding a contact, in which case the contact inherits some fields from the company or individual. However, you can edit those fields if necessary.

To edit most fields, tap inside the field and enter the information. If the field has an ellipsis button or drop-down arrow, click the button or arrow to enter or select the information. Mandatory fields are indicated with an asterisk.

Gray fields are read-only, which means you can view but cannot edit those fields in MaxMobile. However, you can edit them in Maximizer after synchronizing.

### ➤ To add a company or individual

1. In the Address Book window, tap **Edit > Add > Company or Individual**.
2. Enter the details.
3. Tap **ok** to save and close the entry.

### ➤ To add a contact from the Address Book list

1. In the Address Book window, select the company or individual.
2. Tap **Edit > Add > Contact**.
3. Enter the contact details.
4. Tap **ok** to save and close the contact.

### ➤ To add a contact to the company or individual

1. Open the company or individual entry.
2. Tap the **Contacts** tab.
3. Tap **Edit > Add**.
4. Enter the contact details.
5. Tap **ok** to save and close the contact.

## Editing Address Book Entries



Fields shown with a gray box are read-only, which means you cannot edit those fields in MaxMobile. However, you can edit them in Maximizer.

### ➤ To edit an Address Book entry

1. Open the Address Book entry.
2. Tap **Edit**.
3. Tap the field to edit and enter your changes.
4. Tap **ok** to save your changes and close the entry.

## Deleting Address Book Entries

Deleting an Address Book entry in MaxMobile deletes it on the device only. Synchronizing with Maximizer will not delete the entry in Maximizer, but it will remove the entry from the synchronized Favorite List.

### ➤ To delete an Address Book entry

1. In the Address Book window, select one or more Address Book entries to delete.
2. Tap **Edit > Delete**.

### ➤ To restore a deleted Address Book entry

1. In Maximizer, add the entry to the synchronized Favorite List.
2. Synchronize with MaxMobile.

## Working with User-Defined Fields



If you have synchronized any user-defined fields from Maximizer, you can edit their values in the User-Defined Field tab of Address Book entries in MaxMobile. If you have not synchronized any user-defined fields from Maximizer, the User-Defined Fields tab will be blank. You cannot create, edit, or delete user-defined fields in MaxMobile. You can only modify the values of those user-defined fields.

Specify which user-defined fields to synchronize in the Windows Mobile Settings tab of the Maximizer Preferences window (File > Preferences).

### > To view user-defined fields

1. Open the Address Book entry.
2. Open the **User-Defined Fields** tab.

### > To edit user-defined field values

1. In the User-Defined Fields tab, tap the **Edit** button.
2. Edit the user-defined fields as needed.
3. Tap **ok** to save changes.

### > To remove user-defined field values

- For table user-defined fields that allow a single-value only, select the blank item from the drop-down list.  
- or -
- For table user-defined fields that allow multiple values, clear the checkboxes for that user-defined field.  
- or -
- For other types of user-defined fields, select the text and tap the backspace key in the keyboard.

Note to delete date field values, you must tap and hold in the date field and select **None** from the menu.

## Emailing Address Book Entries



You can easily email an Address Book entry. From the Actions menu, the default email address in an entry is used, but you can send an email to a different email address by opening the entry and tapping on any address. Up to three email addresses per entry can be stored in MaxMobile.

### > To email an Address Book entry

- While an entry is selected, choose Write an Email from the Actions menu.

- or -

Open an entry and tap on any email address.

To send an email to an address other than the default email address, open the entry and tap on the address.

## Phoning Address Book Entries

You can phone an Address Book entry if your device is phone-enabled. By default, the first phone number in an entry is used, but you can select a different phone number by opening the entry and tapping on the phone number. Up to four phone numbers per entry can be stored in MaxMobile.

### > To phone an Address Book entry

- While an entry is selected, choose Make a Call from the Actions menu.

- or -

Open an entry and tap on any phone number.

To use a phone number other than the default number, open the entry and tap on the phone number.

## Address Book Entry Notes



Your MaxMobile database includes any Address Book notes synchronized from Maximizer, as specified in your synchronization preferences, as well as any notes added manually in MaxMobile. MaxMobile does not add any automatic history notes.

You can view, add, edit, and delete Address Book entry notes in MaxMobile.

### Viewing Address Book Entry Notes

View notes through the Notes tab in the Address Book entry. If you click the arrows on the right side of the Notes title bar, it expands to display the Notes header, where you can filter the list to display notes of a specific type only.

The Notes header also includes a Show All checkbox. If the checkbox is selected, it displays notes of the selected type for all related contacts of the currently open entry. If the checkbox is cleared, it displays notes for the current Address Book entry only.

As with the Address Book entry list, you can sort and resize any of the columns in the Notes tab, and you can select multiple entries in the list.

#### ➤ To view Address Book entry notes

1. Open the Address Book entry and open the **Notes** tab.
2. Select the note and tap **Edit > Open**.

When the note is open, you can click the up or down arrow to scroll to the next or previous note in the list.

## Adding Address Book Entry Notes



Notes are always associated with an Address Book entry, so you must open or select an Address Book entry before you can add a note.

When you add a note, you can assign it a category. Only note categories synchronized from Maximizer are available. You cannot add new note categories in MaxMobile.

All notes added in MaxMobile will be synchronized with Maximizer, regardless of your synchronization preferences.

### > To add an Address Book entry note

1. In the Address Book window, select the Address Book entry.
2. Tap **Actions > Write a Note**.
3. Enter the note.
4. Tap **ok** to save and close the note.

– or –

1. Open the Address Book entry.
2. Open the **Notes** tab.
3. Tap **Edit > Add**.
4. Enter the note.
5. Tap **ok** to save and close the note.

## Editing Address Book Entry Notes



You can edit any notes that you have permission to edit. If you do not have permission to edit a note in Maximizer, you also cannot edit that note in MaxMobile.

### ➤ To edit an Address Book entry note

1. Open the Address Book entry and open the **Notes** tab.
2. Select the note and tap **Edit > Open**.
3. Edit the note.
4. Tap **ok** to save and close the note.

## Deleting Address Book Entry Notes

If you delete a note in MaxMobile, the note will be deleted in Maximizer when you synchronize.

### ➤ To delete an Address Book entry note

1. Open the Address Book entry and open the **Notes** tab.
2. Select the note and tap **Edit > Delete**.
3. Tap **Yes** to confirm.

## Hotlist Tasks



The MaxMobile Hotlist includes any Hotlist tasks synchronized from Maximizer, as specified in your synchronization preferences, as well as any tasks you added in MaxMobile.

You can view, add, edit, and delete Hotlist tasks using the Hotlist window.

### Viewing Hotlist Tasks

When you open the Hotlist window, it displays a list of current Hotlist tasks, including their due date, activity description, and a checkbox to mark them as complete.

Click the arrows on the right side of the Hotlist window title bar to display the total number of tasks and incomplete tasks in the list.

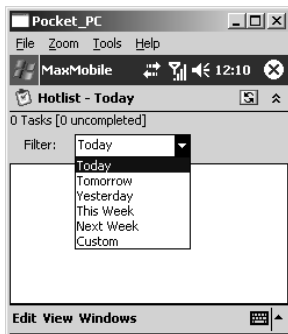
Click the Filter drop-down list to display tasks scheduled for a different date range.

The View menu (at the bottom of the window) includes the following options to filter the list of displayed tasks:

- **Show Carry Forward** displays unfinished tasks scheduled before the specified date range.
- **Show Completed** displays all tasks in the specified date range, including completed tasks.
- **Show Appointments** displays appointments from the calendar along with the Hotlist tasks.

#### ➤ To view a task

1. Open the Hotlist window.
2. If necessary, tap the **View** menu to filter the displayed Hotlist.
3. Tap a task in the list to view the task details.



➤ **To view tasks associated with the current Address Book entry only**



1. In the Address Book window, open the Address Book entry.
2. Tap the **Activities** tab.

The Activities tab lists the appointments and Hotlist tasks scheduled with the Address Book entry.

3. Tap a Hotlist task to view the task details.

## Adding Hotlist Tasks

You can add a personal task or one associated with an Address Book entry.

When you add a Hotlist task, it fills in the Date automatically with the current date, but you can change it if necessary. The Activities field is mandatory and cannot be left blank.

➤ **To add a task associated with an Address Book entry**

1. In the Address Book window, select or open the Address Book entry.
2. Tap **Actions > Schedule To-do**.
3. Enter the task details.
4. Tap **ok** to save and close the task.

➤ **To add a personal task**

1. In the Hotlist window, tap **Edit > Add**.
2. Enter the task details.
3. Tap **ok** to save and close the task.

MaxMobile 11:48 ok

**Add Task**

**Schedule date and time**

Date: May 3, 2006

Time: 1:00 PM

Set alarm 10 minute(s) prior

**Details of task**

Activity: Phone Bill

Priority:

Task is completed

Personal Hotlist task

Hotlist task with ABC Wine Shop Inc.

Cancel

## Editing Tasks



When you open a task, you are automatically in edit mode and can change the task details as necessary.

When you open a task that is associated with an Address Book entry, the Address Book entry name at the bottom of the task becomes a link. You can tap the link to open the Address Book entry. Make sure you save any changes before linking to the Address Book entry.

### > To open a task from the Hotlist window

1. Open the Hotlist window.
2. Tap the task to open.

### > To open a task from the Address Book window

1. Open the Address Book entry the task is associated with.
2. Open the **Activities** tab.
3. Tap the activity to open.

### > To edit the details of a task

1. Open the Hotlist task.
2. Edit the task details as necessary.
3. Tap **ok** to save and close the task.

### > To mark a task complete

- In the Hotlist window, tap the checkbox beside the task.

– or –

- In the Edit Task window, tap the **Task is completed** checkbox, and then tap **ok** to save and close the task.

## Deleting Tasks



If you delete a task in MaxMobile, the task will be deleted in Maximizer when you synchronize.

### ➤ To delete a task from the Hotlist window

1. In the Hotlist window, tap and hold on the task until the context menu opens.
2. Select **Delete**.
3. Tap **Yes** to confirm.

### ➤ To delete a task from the Address Book window

1. Open the Address Book entry the task is associated with.
2. Open the **Activities** tab.
3. Tap and hold on the task until the context menu opens.
4. Select **Delete**.
5. Tap **Yes** to confirm.

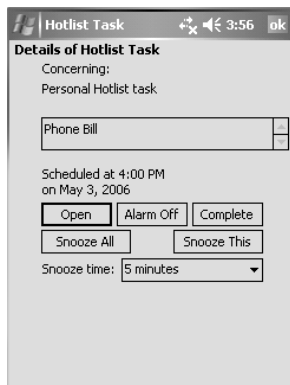
## Hotlist Task and Appointment Alarms

If you set an alarm for a task or appointment, an alarm window appears at the scheduled alarm time. It displays the details of the task or appointment and enables you to open the task or appointment, turn the alarm off, complete the task or appointment, or snooze the alarm for a specified period of time.

The alarm appears even if MaxMobile is closed or if the device is turned off.

If you tap ok, the alarm will appear again at the next interval as specified in the "Alarm frequency" field in MaxMobile Preferences.

You can disable alarms by clearing the "Enable alarms" checkbox in Maximizer Preferences.






## Calendar Appointments



The MaxMobile calendar includes any appointments synchronized from Maximizer, as specified in your synchronization preferences, as well as any appointments you added in MaxMobile. You can view, add, edit, and delete appointments using the Calendar window.

### Viewing Appointments

You can view the calendar in daily, weekly, or monthly view mode. While you are in any of these view modes, you can scroll backward and forward through the days, weeks, or months using the arrow buttons   in the calendar title bar.

You can also jump directly to a specific date using the Go To Date button  in the calendar title bar.

When viewing appointment details, the "Location", "Resource(s)", or "Other users to attend" fields are view-only. You cannot use these fields in appointments added in MaxMobile, and you cannot edit these fields in appointments synchronized from Maximizer.



#### > To change the calendar view mode

1. Open the Calendar window.
2. Tap the **View** menu, and tap **Daily**, **Weekly**, or **Monthly**.

#### > To change the default calendar view mode

1. Open the Preferences window.
2. Select **Daily**, **Weekly**, or **Monthly** from the **Default Calendar view** list.
3. Tap **ok**.

➤ **To view an appointment**



1. Open the Calendar window.
2. Locate the appointment in the Daily, Weekly, or Monthly view.
3. Select the appointment and tap **Edit** > **Open** to view the appointment details.

➤ **To view appointments associated with the current Address Book entry**

1. In the Address Book window, open the Address Book entry.
2. Tap the **Activities** tab.

The Activities tab lists the appointments and Hotlist tasks scheduled with the Address Book entry.

3. Tap an appointment to view the appointment details.

## **Adding Appointments**

You can add a personal appointment or one associated with an Address Book entry.

When you add an appointment, it fills in the Date, From, and Until fields automatically, but you can change them if necessary. The Activities field is mandatory and cannot be left blank.

You cannot add recurring appointments in MaxMobile. When editing a recurring appointment that has been synchronized from Maximizer, any changes you make will apply to the current instance of the appointment only.

You cannot add multi-user appointments in MaxMobile. However, when editing a multi-user appointment synchronized from Maximizer, the changes will synchronize back to Maximizer for all users (when synchronizing to the same Address Book).

➤ **To add an appointment associated with an Address Book entry**



1. Open the Address Book window.
2. Select or open the Address Book entry.
3. Tap **Actions > Schedule a Meeting**.
4. Enter the appointment details.
5. Tap **ok** to save and close the appointment.

– or –

1. Open the Address Book window.
2. Open the Address Book entry.
3. Open the **Activities** tab.
4. Tap **Edit > Add Appointment**.
5. Enter the appointment details.
6. Tap **ok** to save and close the appointment.

MaxMobile 11:53 ok

**Add Appointment**

Date: May 2006

From: 12:00 PM

Until: 1:00 PM

Set alarm

Activity: \_\_\_\_\_

Priority: \_\_\_\_\_

Completed

Private appointment

Personal appointment

Appointment with ABC Wine Shop Inc.

Appointment Details

Cancel

➤ **To add a personal appointment**

1. Open the Calendar window.
2. Tap **Edit > Add Appointment**.
3. Enter the appointment details.
4. Select the **Personal Appointment** option.
5. Tap **ok** to save and close the appointment.

## Editing Appointments



When you open an appointment, you are automatically in edit mode and can change the appointment details as necessary.

When you open an appointment that is associated with an Address Book entry, the Address Book entry name at the bottom of the appointment becomes a link. You can tap the link to open the Address Book entry.

### ➤ To open an appointment from the Calendar window

1. Open the Calendar in Daily or Weekly view.
2. Tap the appointment to open.

### ➤ To open an appointment from the Address Book window

1. Open the Address Book entry the appointment is associated with.
2. Open the **Activities** tab.
3. Tap the activity to open.

### ➤ To edit an appointment

1. Open the appointment.
2. Edit the appointment details as necessary.
3. Tap **ok** to save and close the appointment.

## Deleting Appointments



If you delete an appointment in MaxMobile, the appointment will be deleted in Maximizer when you synchronize.

### ➤ **To delete an appointment from the Calendar window**

1. Open the Calendar window in daily or weekly view mode.
2. Tap and hold on the appointment until the context menu opens.
3. Select **Delete**.
4. Tap **Yes** to confirm.

### ➤ **To delete an appointment from the Address Book window**

1. Open the Address Book entry the task is associated with.
2. Open the **Activities** tab.
3. Tap and hold on the appointment until the context menu opens.
4. Select **Delete**.
5. Tap **Yes** to confirm.

## For More Information...



### **MaxMobile Help**

On your Windows Mobile device, start MaxMobile and select the **Help** icon.

### **Maximizer Website**

<http://www.maximizer.com>

### **Knowledge Base**

<http://www.maximizer.com/knowledgebase>

### **Online Demonstration**

<http://www.maximizer.com/maxonlinedemo>

### **System Requirements**

<http://www.maximizer.com/solutions/maximizer/system.html>

### **Supported PDAs, QuickBooks versions, and other third-party products**

<http://www.maximizer.com/support/products.html>

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## **Printing Information**

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## **Applicability**

This document applies to MaxMobile 9 for Windows Mobile OS, version 9.5.

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